




# **CONTRACTING FOR A & E SERVICES**

## **INSTRUCTOR GUIDE**

FEDERAL ACQUISITION INSTITUTE  
CURRICULUM OF PROCUREMENT  
TRAINING COURSES  
CURRENT THROUGH  
FAC 90-37

**OFFICE OF ACQUISITION POLICY  
GENERAL SERVICES ADMINISTRATION**

REF.	STEPS IN PRESENTING THE TOPIC	INSTRUCTOR NOTES
	<p><b><u>Question:</u></b></p> <p>Who uses these files, <b>and</b> who maintains these files within the <u>agency where you work</u>?</p> <p><b><u>Answer:</u></b></p> <ul style="list-style-type: none"> <li>• Evaluation boards</li> <li>• Contracting officer</li> <li>• Any other appropriate Government official, <ul style="list-style-type: none"> <li>- Members of acquisition planning teams.</li> <li>- Small Business Advisors, etc.</li> </ul> </li> </ul>	<p>(Instructor: Allow interaction by providing the students an opportunity to reveal where they are maintained within their agencies).</p>
	<p><b><u>Question:</u></b></p> <p>What is the FAR requirement on submission of the SF 254 and SF 255?</p> <p><b><u>Answer:</u></b></p> <p>SF 254 must be on file and is to be utilized in all A-E selections. FAR makes the use of the SF 255 mandatory for projects estimated to exceed the simplified acquisition threshold, and optional for projects under the threshold. All others must be publicly announced in the CBD, with a mandatory provision that both forms be submitted.</p>	
	<p><b>Review of SF254 &amp; SF255.</b></p> <p>Tell students to turn to page 2-16 in their Text/Reference and follow along as you go over these two forms in detail. This is important for success in doing Exercise 3.6 Slate and Select.</p> <p><b>Note to the Instructor:</b></p> <p>Don't just read the forms. Highlight more important blocks, especially those needed for subsequent exercises.</p>	<p>Forms are not reproduced for IG. Use copies in T/R.</p>

FAR  
36.702  
(b)(2)

TR 2-16  
to 2-28

# LESSON TOPIC GUIDE

## FEDERAL ACQUISITION INSTITUTE

### TOPIC: 3.0 THE SELECTION PROCESS


**Ref:** Text/Reference, Pages 3-1 and 3-4

**Objective:** Perform all the tasks required in association with the selection of an A-E in accordance with Brooks Act procedures and FAR requirements.

**Time:** 8:00 - 8:15

**Method:** Lecture, Flowchart

### LESSON PLAN

REF.	STEPS IN PRESENTING THE TOPIC	INSTRUCTOR NOTES
	<p>Inquire if there were any questions concerning the lesson of the day before, and take a few minutes for discussion if there seems to be any topics that need clarification.</p> <p style="text-align: center;"><b>Introduction</b></p> <p><b>Tell the students:</b> This chapter goes to the heart of the A-E contracting process by discussing, step-by-step, the procedures to be followed in the actual selection of an A-E. The lesson begins with a discussion of the scope of work and concludes with a slate selection exercise.</p> <p>Go through the flowchart with the students explaining briefly each of the enabling objectives. Follow the flowchart review by informing the students that they will prepare a CBD notice for a cafeteria project; and in the afternoon they will review the SF 254s and 255s submitted in response to the CBD notice.</p> <p><b>Note to Instructor:</b>  Refer students to vignette on page 1 of this chapter and ask them: <b>What issues does Laura want her employees to note during their training?</b></p>	<ol style="list-style-type: none"> <li>1. Do Brooks Act procedures promote favoritism?</li> <li>2. Does the Brooks Act promote full and open competition?</li> <li>3. Do Brooks Act procedures promote full and open competition?</li> </ol>

## TOPIC: 3.3 DEVELOP SPECIFIC SELECTION CRITERIA



**Ref.** Text/Reference Pages 3-16 through 3-20

**Objective** Upon completion of this lesson topic, the student should be able to critique specific selection criteria for appropriateness and compliance with FAR.

**Time:** 9:10 - 9:25

**Method:** Discussion, Lecture

### LESSON PLAN

REF.	STEPS IN PRESENTING THE TOPIC	INSTRUCTOR NOTES
	<p>FAR specifies seven selection criteria to be used by agencies in evaluating each potential A-E for award. (See Exhibit 3-6 on page 3-16 of the T/R.) They are incorporated by reference into the CBD. The criteria are identified by a statement in the synopsis such as "See note 24" which is used as a space saving measure.</p>	
	<p><b>Question:</b> How does the A-E know what Note 24 says?</p> <p><b>Answer:</b> In each Monday's addition of the CBD, all of the numbered notes that are referenced in the agency generated text are printed on the back pages. (Note 24, among other things, reprints the text of FAR 36.602-1 entitled "Selection Criteria".)</p>	
	<p><b>Tell the students:</b></p> <p>Refer students to Exhibit 3-7 on page 3-18 of the T/R and go over each one of the 7 elements.</p> <p>Ask the students to describe as many as they can. Emphasize that the criteria should be listed in relative order of importance in the CBD. Assigned weights or numerical factors are used by some agencies; and not allowed in others. Poll the students regarding their agency policy.</p>	

REF.	STEPS IN PRESENTING THE TOPIC	INSTRUCTOR NOTES
	<p><b>Each element is individually tailored for the particular project being advertised.</b></p> <p><b>1. Types of personnel required:</b></p> <p>The criterion will usually be addressed by a statement such as: "Only firms demonstrating expertise in the disciplines of architecture, mechanical, electrical, structural, civil, and environmental engineering need apply for consideration."</p> <p><b>2. Specialized experience/ technical competence:</b></p> <p>This is probably the most important element, because the decision is ultimately subjective as to the evaluation of the A-E firm's specialized experience and technical competence, versus some other firm's specialized experience and technical competence. How the A-E responds to this is critical. Sufficient specific information must be provided in order for the Government to make an assessment.</p>	

## CLASSROOM EXERCISE CE-3.4

### PART I

#### EXAMPLE: CBD ANNOUNCEMENT

1. **R** (Sources Sought)
2. **Date** (MMDD)
3. **Yr.**
4. **FIPS number** (Fed. Information Processing Standard)
5. **Zip Code** of Contracting Office
6. **C** (Classification Code)
7. **Contracting Office Address.**
8. **C-Indefinite Quantity Contract for Civil Design and Engineering Services** for projects in the state of Florida. (Type of Contract)
9. **Proposed contract number.**
10. **Opening/Response Date** N/A.
11. **Contact Point/Contracting Officer, Including name and Phone No.**
12. **Contract Award Number** N/A
13. **Award Dollar Amount.** N/A
14. **Contract Line Item Number.** N/A
15. **Contract Award Date.** N/A
16. **Contractor's Name.** N/A
17. **DESCRIPTION.** (Enter a clear and concise description of the action. The description may not exceed 12,000 textual characters (Approximately 3 1/2 single spaced pages).

#### CLEAR, CONCISE DESCRIPTION OF SERVICES

Architect-Engineer or Engineering Services are required for preparation of plans, specifications, cost estimates, related studies, and all associated engineering services for several projects under an indefinite quantity contract. There is likely to be a wide variation in the complexity and size of the civil design projects issued under this contract as delivery orders. However, no single delivery order will exceed \$300,000 in total fees. The duration of the contract will be for one (1) year from the date of an initial contract award. The proposed contract includes a Government option for the same terms and conditions of the original contract for a period of an additional one (1) year. A maximum of \$500,000 in delivery order fees are possible during each 12 month period of the contract not to exceed \$1,000,000 for the entire contract. Design services will include:

- (A) Replace/Upgrade deteriorated sanitary lines, potable water lines and storm water drainage systems;
- (B) Security fencing;
- (C) Installation and/or repair of shoreline erosion control measures;
- (D) Roads and parking lots, new and resurfacing;
- (E) Perform property and topographic surveys;
- (F) Evaluation and definition of asbestos materials and toxic waste disposition may be required. Subsequent preparation of plans and specifications may require definition of the removal and/or disposal process. Firms responding to this announcement must be prepared to accept the aforementioned as part of their contract responsibility;
- (G) Government will reserve an option to negotiate construction inspection services and the preparation of Operating and Maintenance Support Information;
- (H) Landscaping renovation.